



Solid Waste Management in Georgia

The Road to Recycling

Tell 'em What You're Gonna Tell 'em

Major Trends

Waste Characterization Study findings

Development of Waste Reduction Goal

Strategy to Reduce Disposal, Increase Recycling

Waste Handling Infrastructure

- MSW Landfills
 - 41 Public 3.3 million tons FY 2007
 - 16 Private 9.4 million tons (1.5 imported)
- C&D Landfills
 - 34 Public 1 million tons
 - 19 Private 3.3 million tons
- 319 Closed Disposal Facilities
- 78 Transfer Stations

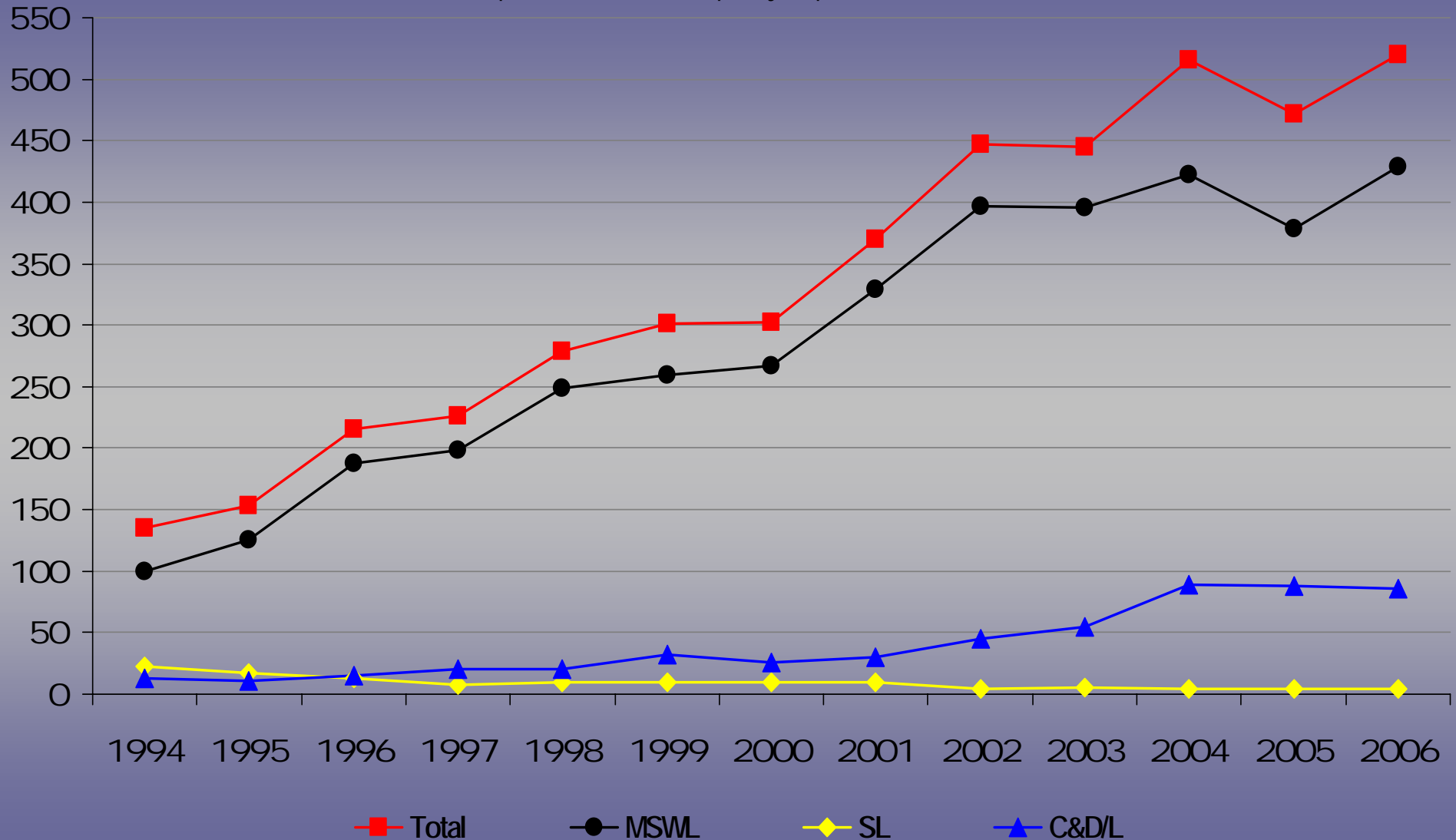
Waste Handling Infrastructure (cont'd)

- Average MSW Tip Fee \$35.38
- \$1/tire fee to SWTF (Hallelujah)
- \$0.75/ton to HWTF
- Remaining Capacity
 - MSW 29 years
 - C&D 41 years

Georgia Disposal Capacity

Reported in Million Cubic Yards

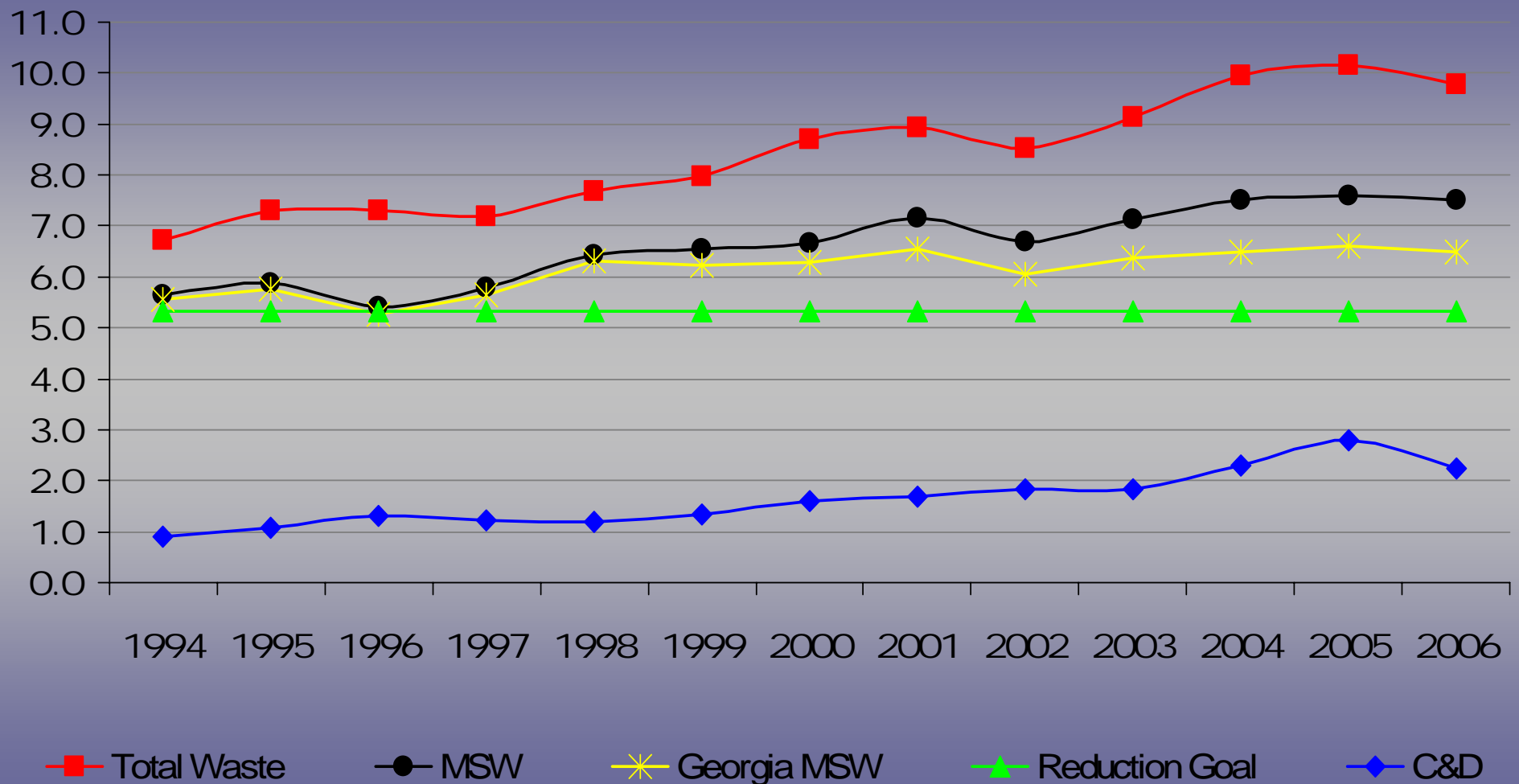
Source: Annual Solid Waste Report/EPD Landfill Capacity Reports



Out-of-State MSW Imports



Per Capita Waste Disposal



Breakdown of Sort

■ 39 Different Categories

- Paper - 7 subgroups
- Plastic - 6 subgroups
- Glass - 4 subgroups
- Metal - 4 subgroups
- Organics - 7 subgroups
- C&D - 5 subgroups
- Inorganics - 6 subgroups

Remove Sample From Incoming Vehicles



Sorting of Waste



568 Samples Collected & Sorted

(60 Tons of Waste)

- 14 Weeks of Sorting (Sept. 2003 to Sept 2004)

- 120 Fall (21%)
- 132 Winter (23%)
- 161 Spring (28%)
- 155 Summer (27%)

- Generating Sector

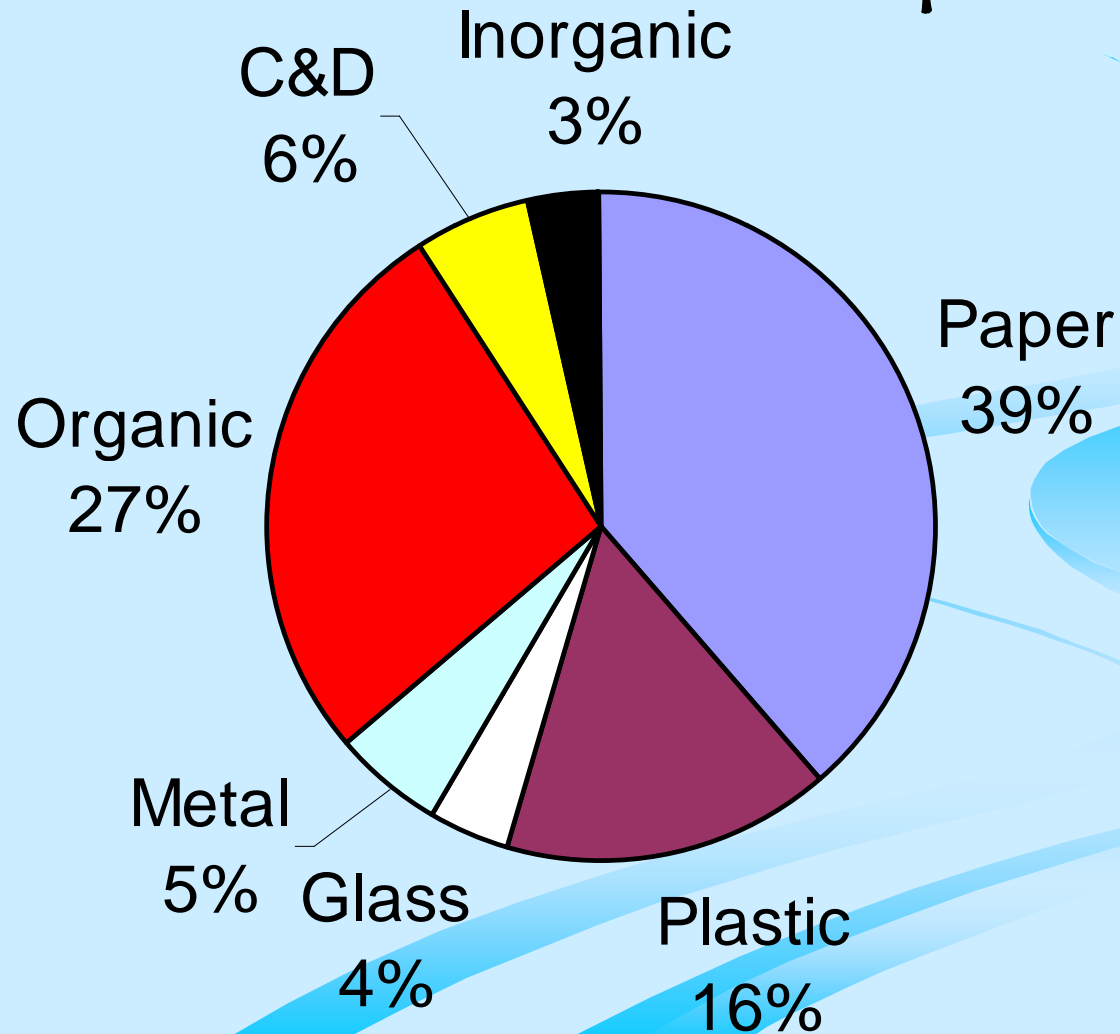
- 240 Residential (42%)
- 225 Commercial (40%)
- 102 Mixed (20%)

- Facility Ownership

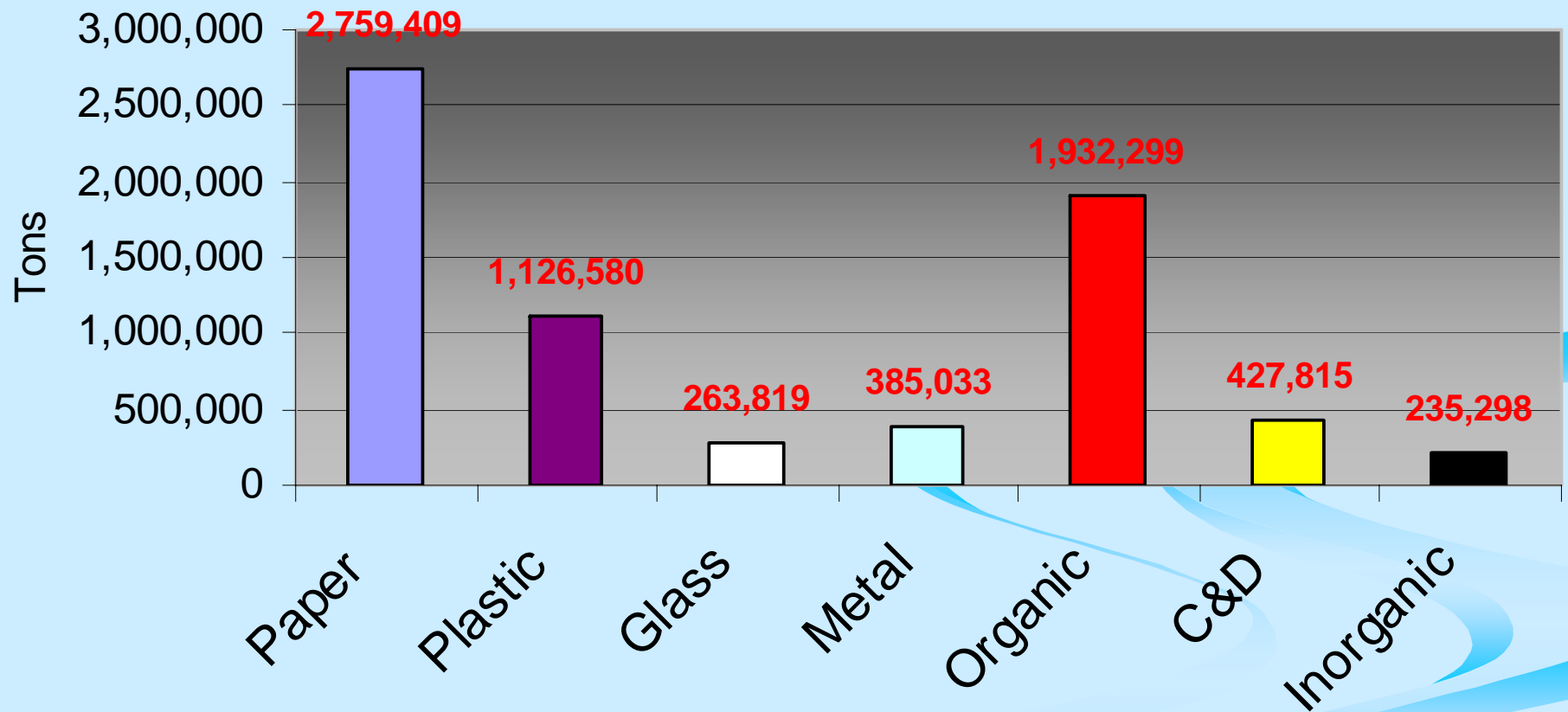
- 330 Private (58%)
- 238 Public (42%)



Georgia MSW Waste Composition FY 2006 Disposal 7.13 million tons (adjusted)

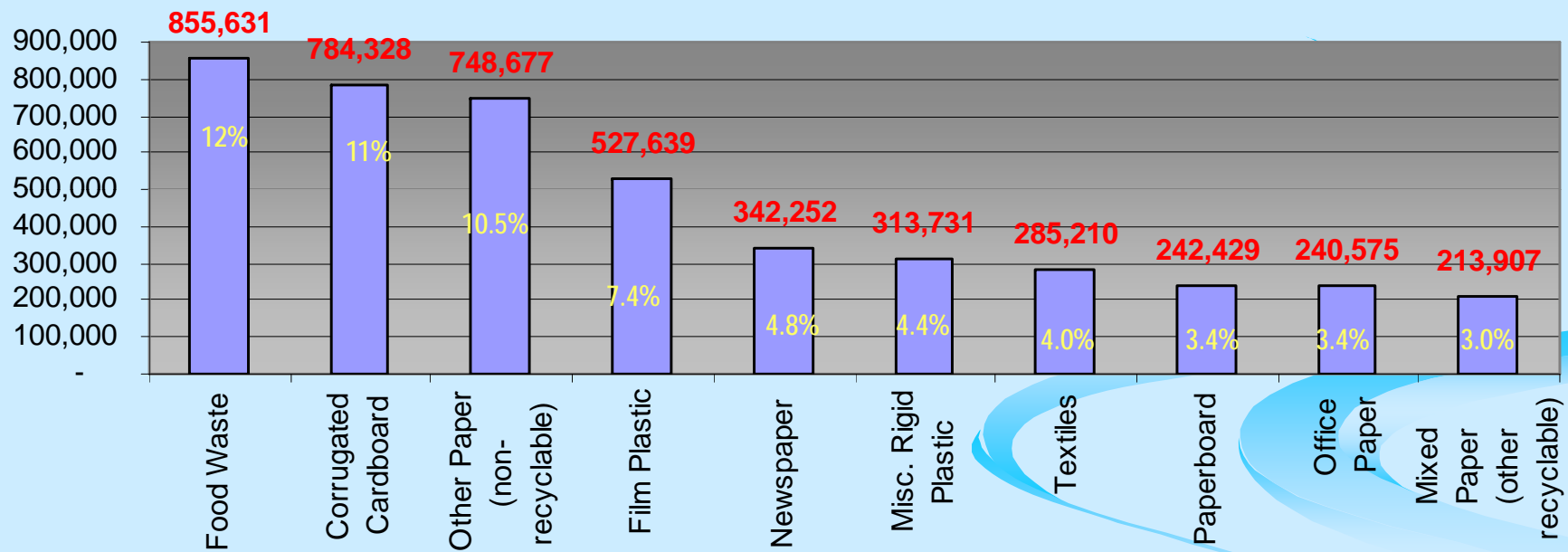


Disposal Rate of MSW in Georgia

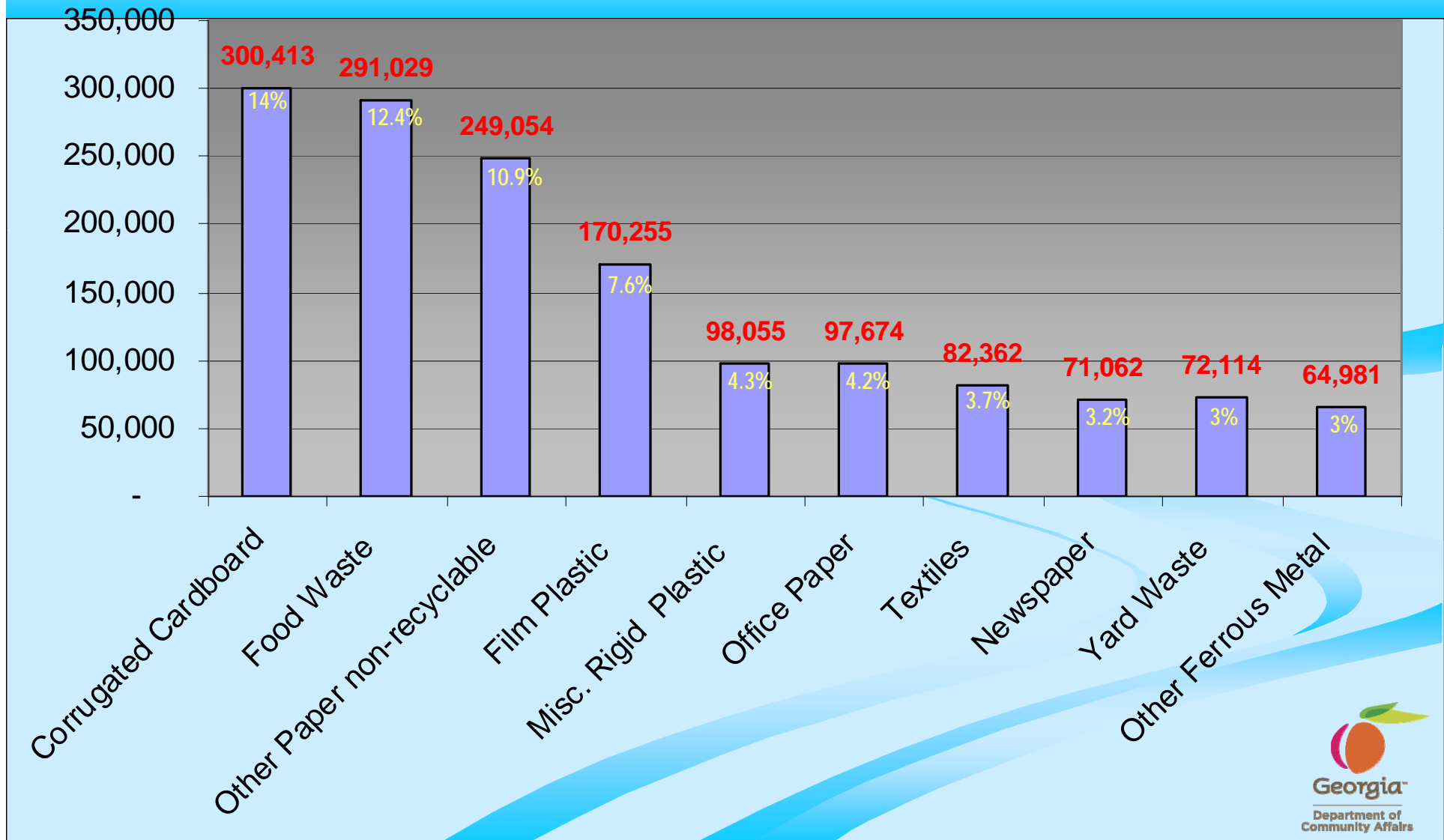


Top 10 MSW Materials Disposed

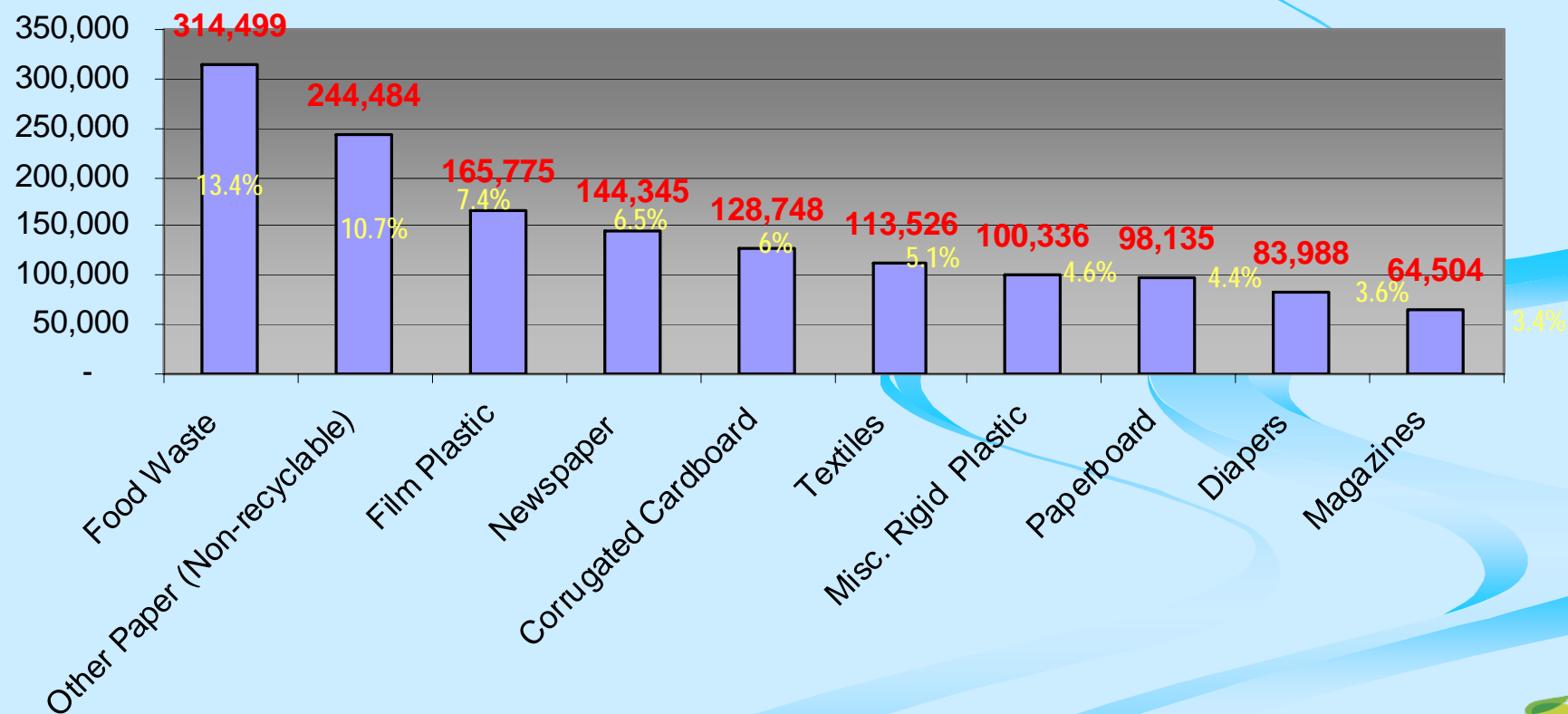
In Tons



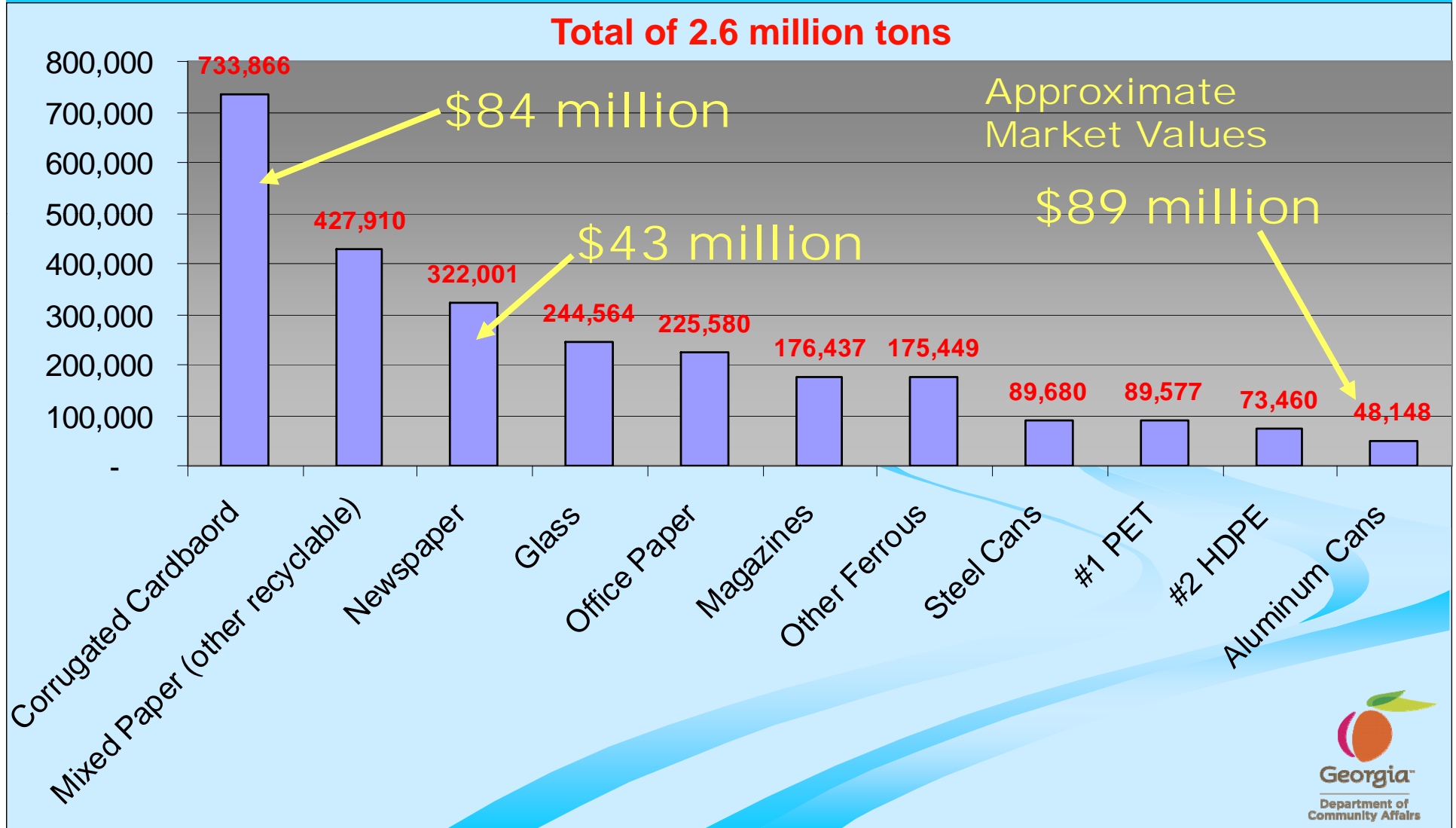
Top 10 Commercial MSW Materials Disposed



Top 10 Residential MSW Materials Disposed

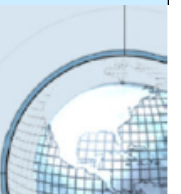


Georgia's Disposal Rate of Recyclables in Tons



Georgia's Paper Industry

- 10 Pulp & Paper Companies Headquartered
- 9 of the 16 Mills using recycled fiber rely exclusively on recycled materials for their operations
- \$10 billion annual shipments of paper products
- 25,000 Employees - Annual payroll \$1 billion
- Georgia Mills consumed over 2.7 million tons of recovered paper in 2003, over 7.7% of total US consumption



Georgia's Plastic Industry

- Almost 2% of Georgia's Workforce with 74,810 Employees with an annual payroll of approx. \$940 million
- \$8.7 billion in annual sales
- 1/3rd of all PET Beverage Containers recycled in N. America are recycled in Georgia
- 54 of the 495 plastic manufacturers use recycled plastic in their operations

Aluminum & Glass

- Novelis - Aluminum Recycler in Greensboro, Georgia
- Glass
 - Strategic Recycling, supplying glass to 2 Manufacturers using recycled glass in the State

Barriers to Increased Waste Diversion

- Competition with low tipping fees
- Lack of:
 - Civic Will/Understanding
 - Cost-effective/Convenient Collection Infrastructure
 - Regional Processing Capacity

Building a New Bridge for Recycling



Plan for Action – Partnerships

- Established Waste Disposal Reduction Goals
- Away-from Home Recycling Program
- Statewide Recycling Marketing Campaign
- Regional Recycling Collection Hubs
- Establish Recycling Performance Metrics

Commodity Goals Established

Per Capita MSW Disposal Rate/MSW Reduction Goal

Commodity	Actual 2004	Projected 2012	Projected % 2012	Projected 2017	Projected % 2017
Glass	0.153	0.140	8%	0.140	8%
Paper	1.181	1.000	15%	0.850	28%
Metal	0.228	0.198	13%	0.186	18%
Plastic	0.663	0.560	16%	0.530	20%
Total	2.23	1.99	11%	1.71	23%

Governor's Response

Go Big . . .

. . . Go Bold

. . . Let's do it



Away-From-Home Recycling

Complete Turn-key Program – Equipment Grant











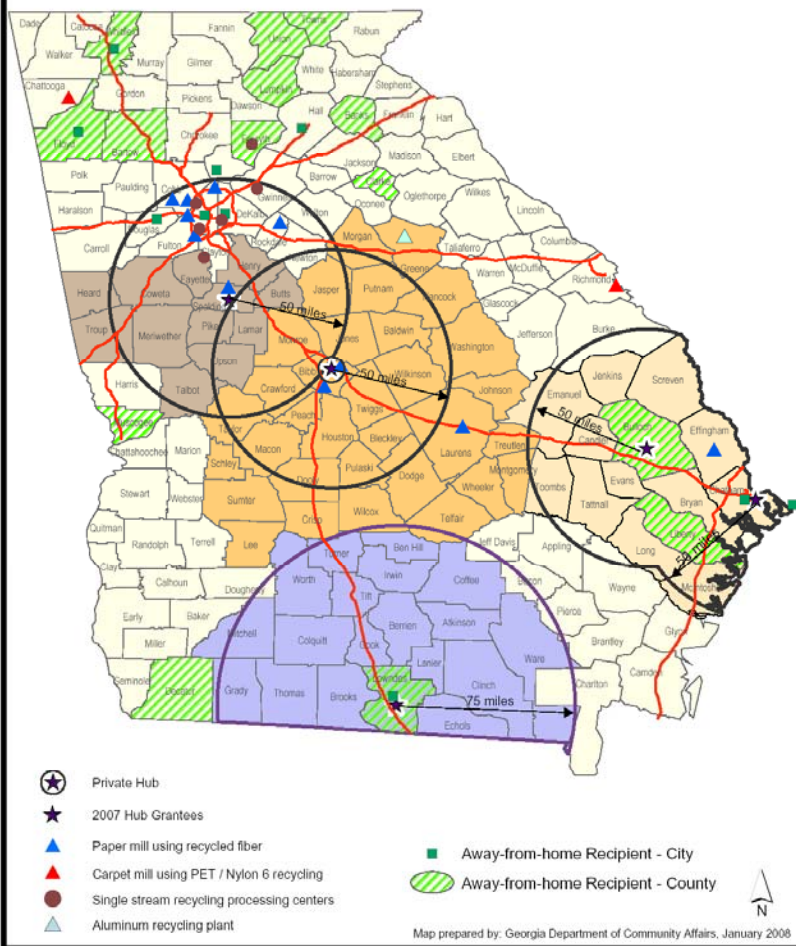
Statewide Media Campaign

- Establish a Recycling Advisory Panel :
 - Identifying programs/activities to achieve goals;
 - Guide the Development of the Campaign
 - Monitor waste reduction progress and programs.

- Hire Communications Research Firm
 - 13 proposals received last week
 - Baseline for recycling attitude, awareness, participation
 - Identify potential target audience(s)
 - Test market messages
 - Post-Campaign Assessment

Recycling Collection Hubs

Regional Recycling Collection Hubs



■ Anticipated Benefits

- Serve 24% State's Population or 19% of the Households
- 185% Increase in Recovered Materials from Grantees
- \$514,000 in avoided tip fees
- \$370,000 in revenue for Host Communities
- ROI of SWTF is 2.8 yrs

Griffin Hub

- Grant Request \$612,000
- Local Match \$329,000
- Private Sector/Partner Match \$190,000
- # of Households Served 325,813
- Estimated % increase in Recovered Materials 162%
- Projected Market Value of Recovered Materials \$26,310
- Estimated Landfill Savings \$35/ton \$92,085
- ROI 4.65 yrs

Griffin Hub (cont'd)

- Address hauling/air quality issues in metro area
- Serves south metro Atlanta with minimal recycling efforts
- Commercial Focus -
- Existing Mandatory Program - control data for other curbside programs
- Service includes communities like LaGrange, Henry, and Fayette Counties

Valdosta Hub

- Grant Request \$425,000
- Local Match \$30,000
- Private Sector/Partner Match \$137,500
- # of Households Served 90,865
- Estimated % increase in Recovered Materials 90%
- Projected Market Value of Recovered Materials \$175,750
- Estimated Landfill Savings \$35/ton \$123,025
- ROI 1.42 yrs

Valdosta Hub (cont'd)

- Historically underserved/supported area of the State
- Strong need for recycling infrastructure development
- Regional cooperation and support
- Public/Private partnership - SP Recycling
- 90% increase in recovered materials

Bulloch County Hub

- Grant Request \$287,300
- Local Match \$2,157,400
- Private Sector/Partner Match \$724,340
- # of Households Served 27,193
- Estimated % increase in Recovered Materials 42%
- Projected Market Value of Recovered Materials \$94,200
- Estimated Landfill Savings \$35/ton \$32,970
- ROI 2.26 yrs

Bulloch County Hub (cont'd)

- Establishes single stream processing in coastal Georgia, service currently not available
- Regional cooperation
- Rural Program
- Public Sector Project
- Potential processing back-up for City of Savannah project

Savannah Hub

- Grant Request \$1,214,977
- Local Match \$587,854
- Private Sector/Partner Match \$3,886,856
- # of Households Served 174,591
- Estimated % increase in Recovered Materials 4,451%
- Projected Market Value of Recovered Materials \$76,120
- Estimated Landfill Savings \$35/ton \$266,420
- ROI 2.79 yrs

Savannah Hub (cont'd)

- Strong local commitment - hired Recycling Coordinator and budget for on-going education
- Leveraging the construction of a hub
- Catalyst for the region, currently pursuing regional compacts
- Strong incentive for reduction - desire to extend landfill and have recycling program supplement or replace waste incinerator
- Public/Private Partnership - open bid - implementation of curbside program and grant funding is linked to current RFP for private hub development

Effect of Hubs

- Serve 24% of the State's 2000 population
- Serve 19% of the State's 2000 households
- Estimated 185% increase in recovered materials from grantees alone
- Estimated annual savings of \$514,500 in avoided landfill tip fees (\$35/ton)
- Estimated annual market revenues of \$370,000 (actual market value of recovered materials would be higher, this is the estimated revenue to the grantees)
- Estimated return on investment is 2.8 years

Macon Hub

- Private Partnership
 - Macon Iron & Paper Stock Co. and SP Recycling Corp.

- Population Served
 - 277,044 Households
 - 2000 Population of 756,740
 - 2010 Est. Population of 815,612











RECYCLE
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GEORGIA

Did you know? Recycling is important to Georgia's economy.

• Novelis, one of the largest aluminum recyclers in the world, processes used beverage cans in Gresham, Georgia.

• The Novelis Gresham plant employs over 100 and has a payroll and tax contribution of approx. \$7 million dollars annually.

• The North American headquarters for Novelis is in Atlanta.







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